

RV BUSINESS

C8950-2

JANUARY 1992

SPECIAL ISSUE: 1992 RV & VAN INDUSTRY DIRECTORY

- ☐ News About
RV Companies,
People and
Products
- ☐ Analyses and
Forecasts
Of RV Shipments,
Retail Sales
- ☐ Calendar
Of RV Shows
And Events
- ☐ Alphabetical
Listings of
RV Makers,
Van Converters,
Suppliers,
Distributors,
Manufacturers'
Reps and
Service Firms



RV BUSINESS
JANUARY 1992
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RV BUSINESS

VOLUME 42, NUMBER 17

JANUARY 1992

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COVER ILLUSTRATION: TOM DILLON

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SEPTEMBER '91 SHOWS RECOVERY

THOMAS WALWORTH

Continued improvement in RV retail sales was experienced during the month of September 1991. Although year-to-date figures still reflected a struggle, with an 8.2% drop in the RV-trailer market and a 23.1% decline in motorhome sales, the monthly statistics were looking better. RV-trailer sales during September were up by 3.2%, or 262 units, and motorhome sales for the month dipped only by 4%.

September 1991 RV-trailer market results are shown in Figure 1 (see page 16), which ranks the seven regions of the nation according to their percent of change from sales in September 1990.

The state of Missouri, with the largest increase, set the pace for the West North Central region to lead the country in September. The Pacific region was a disappointment, with bottom-ranked California pulling in behind the rest of the nation.

Year-to-date, the RV-trailer market was down by 7,590 units, or 8.2%, from the same period of 1990. The national regions' 1991 year-to-date performance ranking is shown in Figure 2.

The largest gain over the period was seen in the top-placed West North Central region's North Dakota, while the state of New Hampshire suffered the greatest decline, bringing the Northeast to the bottom of the list.

In motorhome sales during the month of September, a 138-unit decline, for a 23.1% drop, from the September 1990 level was recorded. Figure 3 ranks the country's seven regions by their September 1991 motorhome sales performance as compared with that of September 1990.

In the leading West North Central region, the state of Nebraska logged the largest gain in sales for September. Illinois, in the trailing East North Central region, suffered the month's greatest decline.

Over the first nine months of 1991, motorhome sales were off by 23.1%, or 9,143 units, from sales during the corresponding period of 1990. Figure 4 shows regional performance in year-to-date motorhome sales compared with that over the same period of 1990.

The smallest decline in motorhome



East North Central: Illinois, Indiana, Michigan, Ohio, Wisconsin; **Mountain:** Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming; **Northeast:** Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont; **Pacific:** Alaska, California, Oregon, Washington, Hawaii; **South Atlantic:** Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia; **West North Central:** Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota; **South Central:** Texas, Oklahoma, Arkansas, Louisiana, Tennessee, Mississippi, Alabama.



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AT RETAIL *continued*

sales, year-to-date, was experienced in the leading Pacific region, where California ranked highest. Maine, in the lagging Northeast, was hardest hit.

Encouragement is offered by the fact

RV TRAILERS, SEPTEMBER '91				
Sept. '91 Rank	Region	% of Change From Sept. '90	Aug. '91 Rank	
1	W.N. Central	15.7	2	
2	S. Central	12.7	3	
3	E.N. Central	11.8	4	
4	Northeast	5.7	6	
5	Mountain	4.5	5	
6	S. Atlantic	-4.2	7	
7	Pacific	-9.3	1	

Figure 1

RV TRAILERS, YEAR-TO-DATE				
Sept. '91 Rank	Region	% of Change Year-to-Date	Aug. '91 Rank	
1	W.N. Central	-0.8	2	
2	E.N. Central	-0.2	1	
3	Mountain	-0.8	3	
4	S. Central	-8.3	5	
5	Pacific	-9.8	4	
6	S. Atlantic	-11.3	6	
7	Northeast	-16.2	7	

Figure 2

MOTORHOMES, SEPTEMBER '91				
Sept. '91 Rank	Region	% of Change From Sept. '90	Aug. '91 Rank	
1	W.N. Central	8.0	1	
2	Pacific	4.9	3	
3	Mountain	1.6	2	
4	S. Central	-6.7	7	
5	Northeast	-8.0	6	
6	S. Atlantic	-9.5	5	
7	E.N. Central	-13.6	4	

Figure 3

MOTORHOMES, YEAR-TO-DATE				
Sept. '91 Rank	Region	% of Change Year-to-Date	Aug. '91 Rank	
1	Pacific	-16.8	1	
2	W.N. Central	-18.1	2	
3	Mountain	-20.7	4	
4	E.N. Central	-21.8	3	
5	S. Central	-23.2	5	
6	S. Atlantic	-32.3	7	
7	Northeast	-32.8	6	

Figure 4

that September numbers, overall, showed the RV market turning the corner to head back on the trail to recovery. The gap in retail sales from year-end 1990 figures demonstrated the worst of the market slump. However, motorhomes could close out the year by narrowing that gap to 15% of 1990's market. Δ

Thomas Walworth is general manager of Statistical Surveys Inc., Grand Rapids, Mich., which has reported retail statistics for 30 years to the RV industry. Statistical Surveys is an acknowledged leader in the RV statistical field.

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SPECIAL FACTORS BOOST RV INDUSTRY FORECAST FOR 1992

MORTON J. MARCUS

Forecasting with the aid of an econometric model can be fascinating. The model can provide very unexpected results. The latest RV industry forecast is far more bullish than might be expected.

Based on relationships over time, econometric models are very conservative because they assume that past relationships still hold and can be depended on in the future. But we all know that human relationships are not stable, whether in business or in our personal lives. Hence, models, similarly, tend to be wrong if basic relationships change.

The question before America today is "Have basic relationships changed?" Some people will scream "YES, things are not what they used to be!" while others will nod sleepily and remember that "Spring seems to follow winter each year, but some folks are always surprised, as if it never happened before."

The latest RV industry forecast is far more bullish than might be expected.

The RV Forecast

Our last RV forecast, based on the Indiana University econometric model, was too conservative: We expected to ship 83,100 units in the third quarter of 1990, and 87,700 were actually shipped. That improved performance in the third quarter boosts our forecast for the remainder of 1991 and 1992, as shown in Figure 1.

This new forecast seems remarkably optimistic since it calls for major growth in the RV industry in a year that everyone, ourselves included, is expecting to be very

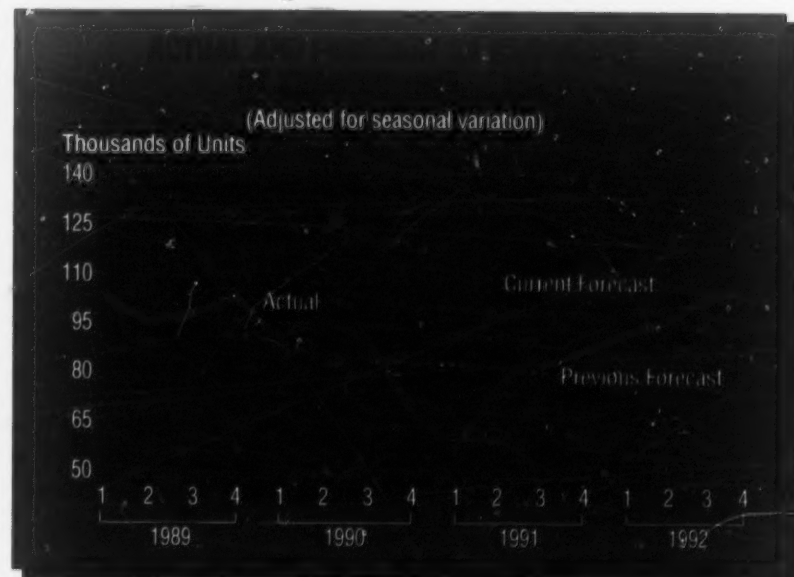


Figure 1

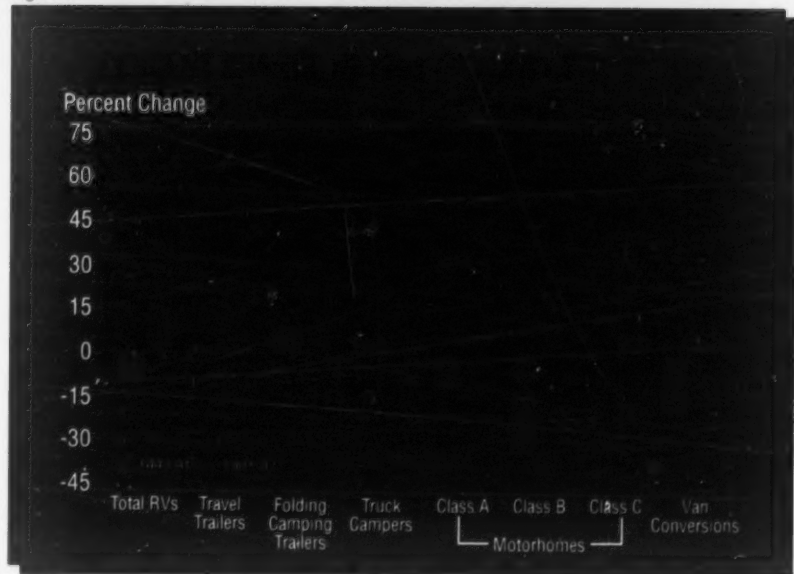


Figure 2

sluggish. How can it be that the RV forecast our model now yields is so bullish? Why do we now expect over 420,000 units shipped in 1992 rather than the 390,000 units forecast just two months ago?

Before the answers to those questions, let's look at the industry in detail. Although we expect all types of RV shipments to improve next year, not every type is as strong in this forecast as in our previous effort.

QUARTERLY FORECAST

There are shifts which are worth noting.

Figure 2 shows each type of RV shipment will improve, some very strongly in 1992 after either declines or just modest gains in 1991. But this version of our forecast is less bullish on folding camping trailers and Class B motorhomes. All other forms of RV units are now expected to do better in 1992 than we had previously expected.

These are the results of the model. The conventional wisdom as these words are written is that the American economy and the RV industry are in serious trouble. Within the industry, there is a sense of great concern. Within the nation, the recession is regarded as a major calamity. Both views are contrary to what a rational person would conclude from the evidence, but no one says that RV industry people or Americans in general are rational.

Let's look at the evidence. We are now forecasting 314,700 units for 1991. That is down 10.2% from 1990, which was down

in the industry today who survived and remembers those bleak days? The weak years of this recession do not match the low years of the early 1980s.

The National Forecast

The same lack of perspective infects the national discussion of this recession. This current weak economy is not a disaster

Each type of RV shipment will improve, some very strongly in 1992 after either declines or just modest gains in 1991. But this version of our forecast is less bullish on folding camping trailers and Class B motorhomes. All other forms of RV units are now expected to do better in 1992 than we had previously expected.

ANNUAL GROWTH RATES AFTER ADJUSTMENT FOR INFLATION

	1990	1991	1992
		-- Forecast --	
Gross National Product	1.0	-0.5	1.8
Consumer Spending	0.9	0.4	2.1
Business Investment	1.8	-2.3	5.0
Residential Investment	-5.4	-11.4	9.3
Exports	6.4	3.7	3.3
Imports	2.8	1.4	8.9
Govt. Purchases			
Federal	2.6	0.5	-3.0
State & Local	3.0	0.4	0.0

Figure 3

KEY FACTORS IN THE FORECAST

	1990	1991	1992
		-- Forecast --	
Prime Interest Rate (%)	10.0	8.5	6.7
Value of the Dollar (1973=100)	89.0	90.9	93.0
Unemployment Rate (%)	5.5	6.7	6.9
% Change at Annual Rates:			
Money Supply (M2)*	5.2	3.0	4.4
Real Disposable Personal Income	0.9	-0.4	1.6
Consumer Price Index	5.4	4.3	4.0
Food & Beverages	5.7	3.6	2.4
Motor-Fuel Prices	14.3	-1.7	0.7
Medical care	9.1	8.8	7.3

*M2 consists of the nation's basic money supply of currency, plus demand deposits, plus savings accounts at commercial banks.

Figure 4

11.4% from the 395,400 units of 1989. Sounds pretty bad, until you look back to 1980, 1981 and 1982. In those years, the industry shipped 188,000, 239,000 and 258,000 units, respectively. Is there anyone

comparable with the early '80s. The economy lacks the strength all of us wish it would have, but America is not a feeble, drunken giant struggling to stay on its feet.

Our forecast for 1992 is one of improvement, but not strength. The total value of all goods and services produced by the U.S. economy, after adjustment for inflation, is measured by the real gross national product (real GNP). After a decline of one-half of 1% in 1991, we expect a very slow recovery of just 1.8% in 1992. (See Figure 3.)

Consumer spending will grow a little better at 2.1%. Both business investment and residential investment will advance smartly, after poor performances for the past few years. Improved consumer spending will

ANNUAL TRENDS

	1990	1991	1992
		-- Forecast --	
Unit Auto Sales (millions)	9.51	8.57	9.48
Unit Housing Starts (millions)	1.20	1.01	1.24
Personal Savings Rate (%)	4.57	3.98	3.73
% Change in Compensation per Manhours	3.45	4.02	4.45
Productivity	-0.44	0.74	0.63
Unit Labor Costs (Compensation - Productivity = Unit Labor Costs)	3.89	3.28	3.82

Figure 5

help imports, while exports, which have been a small bright light in the past two years, will not grow as rapidly as in the recent past. Government, at both the federal and local levels, will not contribute any stimulus.

Several special factors pertinent to the RV industry are shown in Figure 4. First, note the expected decline in the prime rate of interest. This follows other downward interest-rate movements, which tend to be very favorable for the RV industry. In addition, an improvement in real disposable income tends to increase RV shipments. Finally, the increase in motor fuel prices in 1992 is expected to be low and well below the general increase in consumer prices. This is always a favorable factor for RVs. The anticipated improvements in auto sales and housing starts (Figure 5), plus a moderate underlying cost-push factor (unit labor costs), all give positive indications for a revived economy.

Clearly, a better showing in many of the factors appearing in Figures 3 through 5 would be still more encouraging. The forecast presented here is neither gloomy and discouraging nor wildly optimistic. The gain of 34% for total shipments in 1992 falls short of the 39.5% increase of 1983.

All of this is based on our forecast, which rests on past relationships. If the world of 1992 is truly very different from the record of our national economy, then we are likely to be in error. But at this time, we have no conclusive evidence that there have been such radical shifts in the American economy. Some self-appointed seers may magnify important changes into excessively dramatic trends, but America needs persistent effort more than it needs such seers at this time. Δ

Morton J. Marcus is the director of the Indiana Business Research Center at Indiana University School of Business, where he is also a member of the faculty. Marcus specializes in using statistics to identify economic trends.